

The Economic Impact of Expenditures By Travelers On Minnesota's Northeast Region and The Profile of Travelers

June 2005 – May 2006

Prepared for:

Explore Minnesota Tourism
State of Minnesota



UNIVERSITY OF MINNESOTA



and

Minnesota Arrowhead Association

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1.0 Introduction

This is the first report of the Economic Impact of Traveler Expenditures on the Northeast Region prepared by *Davidson-Peterson Associates*. This report covers traveler expenditures made in the Northeast Region during the 12-month period from June 2005 through May 2006.

The purpose of this study is to measure the economic benefits the Northeast Region residents and governments derive from the dollars spent by travelers in the region.

These economic benefits include:

- **Total expenditures** made by travelers;
- Number of **full-time equivalent jobs** supported by these expenditures;
- **Wages, salaries and proprietary income** earned by area residents as a result of these expenditures; and
- **State and local government revenues** generated by traveler expenditures.

The economic impact estimates in this report may be used to document the importance of tourism as a key segment of the Northeast Region's economy; to underscore the need to continue to support the expenditure of time, effort and dollars to promote tourism growth; and to track the results of the Northeast Region's tourism marketing efforts.

In addition, the traveler on-site interviews used in the economic impact analysis are presented as a traveler profile in the last section of this report.

Please refer to the Appendix for a description of the procedures used in executing this study and for definitions of the terms used.

2.0 Executive Summary

2.1 Introduction

Davidson-Peterson Associates was hired to conduct a year-long study which was a joint project with Explore Minnesota Tourism, the University of Minnesota Tourism Center^{*} and the Minnesota Arrowhead, Minnesota Heartland and Southern Minnesota Tourism Associations and the Metro Tourism Committee. Davidson-Peterson Associates was commissioned to conduct a “bottom up” analysis of traveler expenditures in Minnesota and their impact on the economy of the state during the period June 2005 through May 2006. The analysis is based on the following surveys:

- Telephone interviews were conducted with a random sample of accommodations managers in the Northeast Region upon conclusion of each season. During the 12-month period a total of 2,375 interviews were completed statewide, 915 of which were completed in this region, including a census of the Duluth area for a special study.
- Self-administered questionnaires were completed by 2,292 Minnesota travelers who were either staying overnight or had traveled at least 50 miles from home on a day trip. These questionnaires were completed during each of the four seasons and in each of the four regions. Please refer to Appendix A: Procedures (Section D.5) for more detailed information on the sampling approach by region.
- A total of 1,001 telephone interviews were conducted with a probability sample of Minnesota households equally divided among the four seasons.

Total estimated traveler expenditures by category of expense were provided to Dr. William Shaffer of Georgia Tech to develop an input-output model based on the Northeast Region’s economy. The input-output model estimated the number of full-time

^{*} The University of Minnesota Tourism Center is a collaboration of the College of Food, Agricultural and Natural Resource Sciences and the University of Minnesota Extension Service.

equivalent jobs, wages/salaries/proprietary income, and state and local government revenues supported by traveler expenditures.

Additionally, Davidson-Peterson Associates used the self-administered questionnaires conducted among Minnesota travelers over the course of the 12-month period in the Northeast Region to provide a traveler profile for that region. In total, 524 interviews were conducted in the Northeast Region. Using the findings from the state economic impact study, the sample was balanced across *regions* and *seasons*. The Northeast Region traveler profile results are based on a weighted sample of 356.

2.2 The Findings

In total, travelers in the Northeast Region spent \$1.666 billion in the region. Almost half of the region's traveler expenditures were spent by travelers staying overnight in hotels/motels/B&Bs. Almost half of total traveler expenditures were also spent in the summer season.

The \$1.666 billion spent in the Northeast Region from June 2005 through May 2006 supported 40,200 full-time-equivalent jobs, \$711.2 million in resident income (wages, salaries and proprietary income), \$203.6 million in state government revenues and \$68.2 million in local government revenues.

The Northeast Region received 6.36 million person-visits during the period of June 2005 through May 2006. Some 1.51 million person-visits were by travelers on day trips and the balance were made by travelers staying overnight in the Northeast Region (4.86 million). One third of all visits were by travelers staying in hotels/motels/B&Bs (36%) with one in five staying with friends and relatives (22%). Campgrounds (12%) and resorts (6%) accommodated the balance.

Some 251 hotels/motels/B&Bs with 9,197 rooms offered 2.96 million roomnights and sold 1.81 million to guests staying fewer than 30 nights during the period of June 2005

through May 2006. As noted, travelers staying in these rooms made the largest contribution to the traveler expenditures in the Northeast Region.

A total of 286 resorts with 2,897 units made 0.76 million unitnights available and sold 0.37 million of them to guests staying fewer than 30 nights during the 12-month period.

A total of 180 campgrounds on both public and private lands with 6,980 sites, made those sites available for 1.39 million sitenights and sold 0.58 million to guests staying fewer than 30 nights.

Those numbers led to occupancy rates of 61% for hotels/motels, 49% for resorts and 42% for campgrounds.

According to managers' estimates, three in four guests who stayed in the Northeast Region properties were Minnesota residents – 74% in hotels; 76% in campgrounds and 79% in resorts.

Managers estimated that hotel/motel/B&B guests came on average in parties of two and stayed two nights; resort guests came in parties of four and stayed three nights, and campers came in parties of three and stayed three nights.

The table on the following page summarizes the industry highlights for the period June 2005 through May 2006.

2.3 The Northeast Region Lodging and Campground Industry Highlights

Table 2.3

The Northeast Region Lodging and Campground Industry Highlights

June 2005 through May 2006

	<u>Hotels/Motels/ B&Bs</u>	<u>Resorts</u>	<u>Campgrounds</u>
Number of properties	251	286	180
Number of rooms/units/sites	9,197	2,897	6,980
Total available roomnights/unit-nights/sitenights (millions)	2.96	0.76	1.39
Total occupied roomnights/unit nights/ sitenights (millions)	1.81	0.37	0.58
Average occupancy rate	61%	49%	42%
Average daily room rate	\$88.95	--	--
Average unit rate	--	\$154.73	--
Average site rate	--	--	\$22.31
MANAGEMENTS' ESTIMATES:			
Average party size	2.35	4.01	3.48
Average length of stay	1.95	3.40	3.41
<i>Guest Origin</i>			
<u>Out of State</u>	<u>26%</u>	<u>21%</u>	<u>24%</u>
U.S.	21%	20%	21%
Canada	5%	1%	2%
Other foreign	*	*	*
Minnesota	74%	79%	76%
<i>Trip Purpose¹</i>			
Pleasure	67%	97%	--
Business	25%	3%	--
Meeting/convention	8%	1%	--

Note: Length of stay as noted throughout this document represents the average number of nights spent in a single property. It does not necessarily reflect the total number of nights spent in Minnesota. Columns of figures may not add to totals shown due to rounding.

* Less than 0.5%

¹ These statistics not collected for campers

3.0 Estimates of Traveler Expenditures in Minnesota

3.1 Summary

Travelers to the Northeast Region during the period of June 2005 through May 2006 spent **\$1.666 billion** in the state:

- Almost half of those dollars were spent by travelers staying at hotels/motels/B&Bs;
- Food, shopping and recreation account for three quarters of all the dollars spent by travelers; and
- Almost half the dollars were spent during the summer.

3.2 Overall Expenditures

The Northeast Region travelers spent an estimated total of **\$1.666 billion** in the period June 2005 through May 2006.

3.3 Estimated Traveler Expenditures By Accommodation Type

Almost half of the total estimated traveler expenditures, \$751.38 million (45%), were spent by travelers staying overnight in the Northeast Region at hotels/motels/B&Bs.

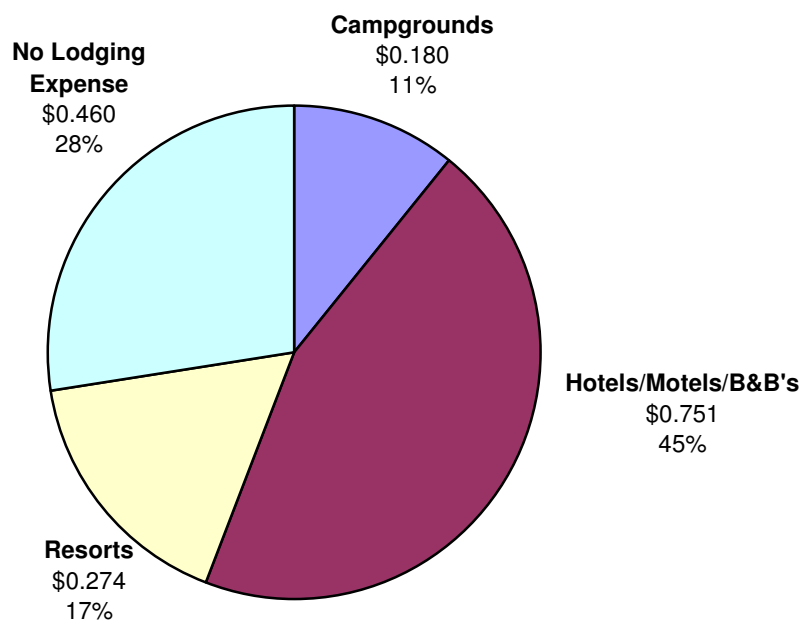
Those staying in resorts in the Northeast Region spent \$274.06 million (17%), and those camping spent \$180.47 million (11%).

Travelers with no lodging expenses spent \$459.71 million, or 28% of the Northeast Region's traveler expenditures.

- Travelers who stayed at the homes of family and/or friends spent \$416.4 million (25%) while visiting the Northeast Region.
- Those visiting just for the day or passing through the Northeast Region spent \$43.31 million (3%).

Figure 3.3

Estimated Northeast Region Traveler Expenditures
By Accommodation Type
June 2005 – May 2006
(\$ Billions)



Total: \$1.666 Billion

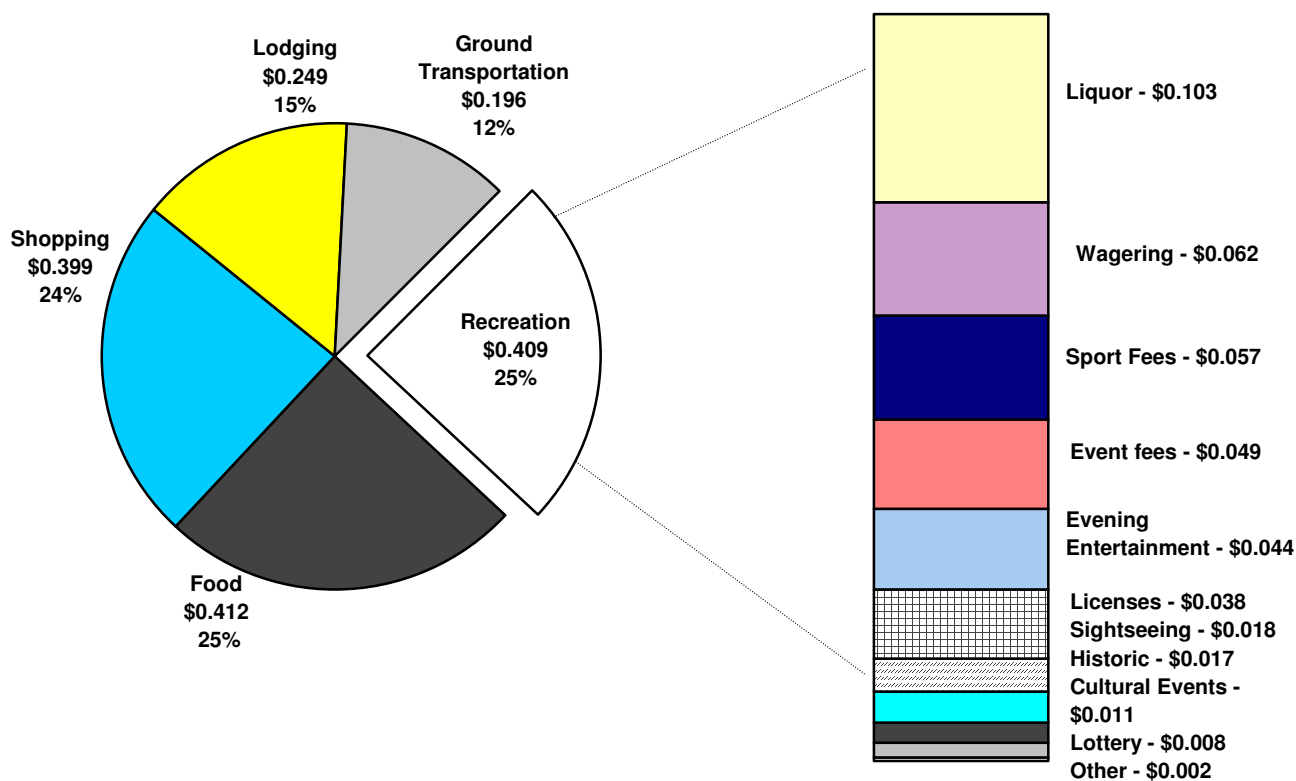
3.4 Estimated Traveler Expenditures By Category of Expenditure

Shopping, food and recreation each accounted for about one quarter (24%-25%) of traveler expenditures.

Lodging expenses represented 15% of the total estimated traveler expenditures (\$249.31 million). Twelve percent of the Northeast Region traveler expenditures (\$196.03 million) were spent on ground transportation.

Figure 3.4

Estimated Northeast Region Traveler Expenditures **By Category of Expenditure** **June 2005 – May 2006** **(\$ Billions)**

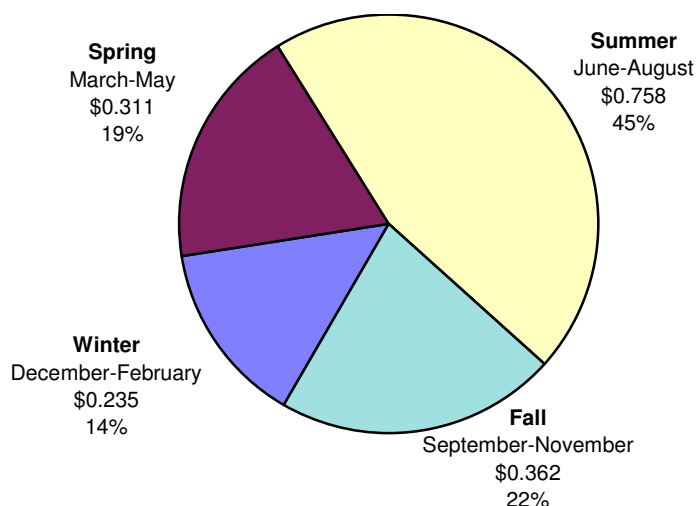


Total: \$1.666 Billion

3.5 Estimated Traveler Expenditures By Season

Travelers spent \$757.56 million, or 45% of all traveler expenditures, in the summer season (June through August). They spent \$362.46 million, or 22% of all traveler expenditures, in the fall season (September through November) and \$310.8 million, or 19% of all traveler expenditures in the spring season (March through May). Finally, travelers spent \$234.75 million, or 14% of total traveler expenditures, in the winter season (December through February).

Figure 3.5
Estimated Traveler Expenditures
By Season
June 2005 – May 2006
(\$ Billions)



Total: \$1.666 Billion

4.0 The Impact of Traveler Expenditures on the Northeast Region

4.1 Summary

The estimated expenditures by travelers in the Northeast Region during the period June 2005 through May 2006 supported 40,200 full-time-equivalent jobs and provided residents with wages, salaries and proprietary income of \$711.2 million. Traveler expenditures also generated \$203.6 million in state government revenues and \$68.2 million in local government revenues.

4.2 Direct and Total Impact: An Explanation

In the text and figures which follow to describe the impact of traveler expenditures on Minnesota, both direct and total impacts are mentioned.

- **Direct** impacts are those economic benefits due directly to the traveler expenditures. For example, when traveler expenditures pay the salary and benefits for a hotel desk clerk, that amount would be considered in the direct impact for both jobs and wages.
- **Total** impacts include all of the direct impacts but also include the estimated indirect impacts. Indirect impacts are the additional jobs and wages supported during additional rounds of spending. For example, the front desk clerk pays income tax and property tax which are an indirect result of tourist expenditures. The front desk clerk also pays her utility bills, buys food for her family, shops for gifts, etc. Those dollars create the indirect impact of the initial traveler expenditures through many additional rounds of spending in the economy.

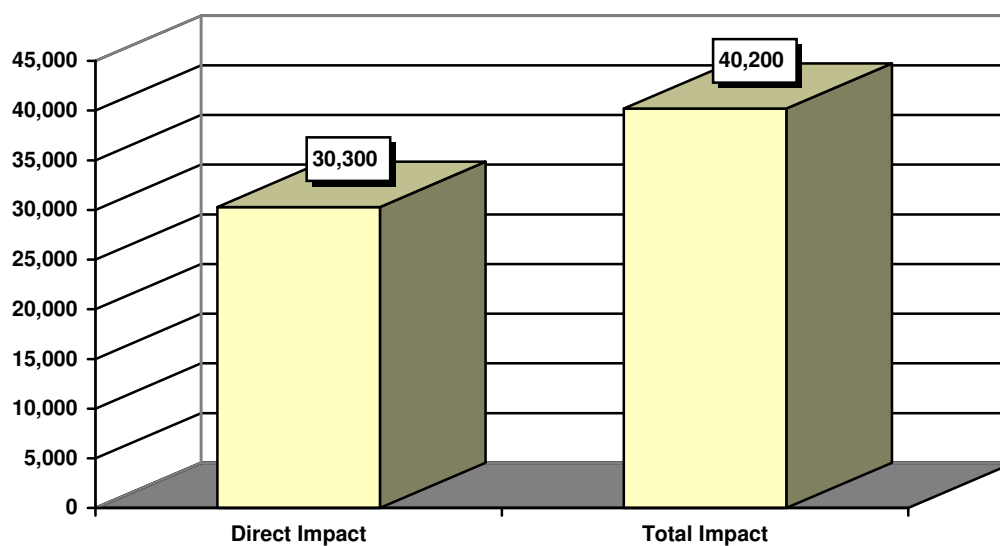
As noted, this report includes direct and total impacts which include both direct and indirect impacts.

4.3 Impact on Jobs for the Northeast Region

During the period June 2005 through May 2006, traveler expenditures in the Northeast Region supported 40,200 full-time equivalent jobs in **total**. About three-quarters of these jobs (75%) were **directly** supported by total estimated traveler expenditures in the Northeast Region (30,300).

Figure 4.3

Resident Employment Impact of Traveler Expenditures
June 2005 through May 2006

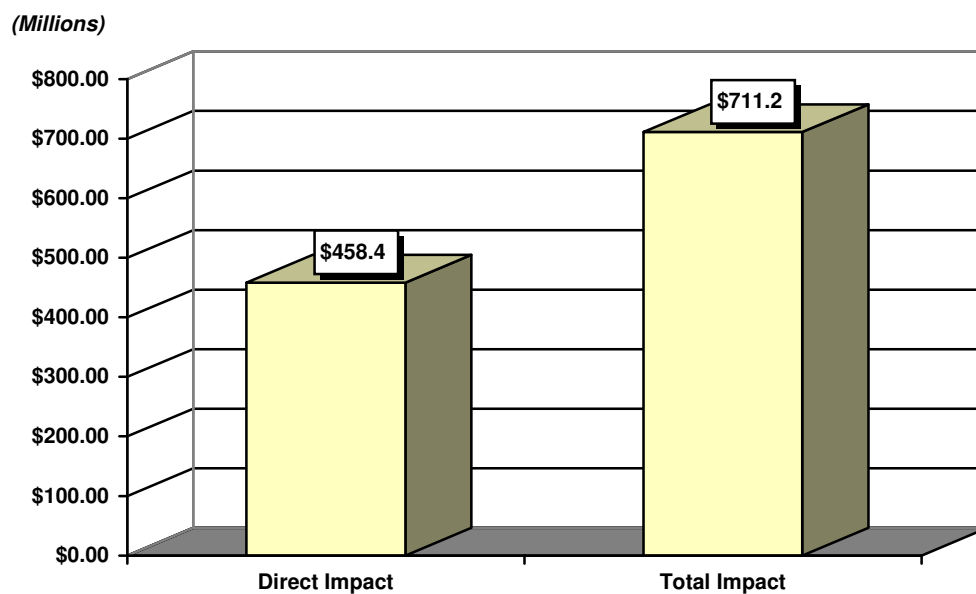


4.4 Impact on Wages, Salaries and Proprietary Income for the Northeast Region

Traveler expenditures in the Northeast Region during the period June 2005 through May 2006 generated \$711.2 million in resident wages and proprietary income in **total**. Nearly two-thirds of this resident income was **directly** generated by traveler expenditures (\$458.4 million or 64%).

Figure 4.4

Resident Income Impact of Estimated Traveler Expenditures June 2005 through May 2006



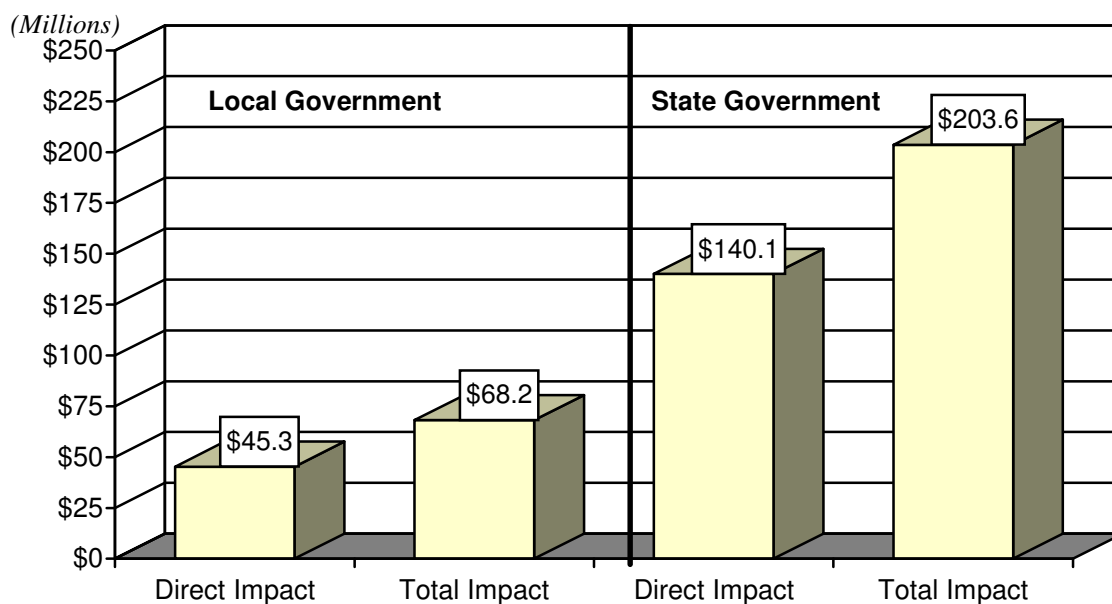
4.5 Impact on State and Local Government Revenues

Traveler expenditures in the Northeast Region led to the receipt of \$203.6 million in state government revenues and \$68.2 million in local government revenues in **total** during the period June 2005 through May 2006.

During the period June 2005 through May 2006 the state government collected \$140.1 million and local governments collected \$45.3 million that were **directly** attributable to traveler expenditures.

Figure 4.5

Impact of Traveler Expenditures on State and Local Government Revenues June 2005 through May 2006



5.0 The Northeast Region Lodging Industry

5.1 Summary

For **hotels/motels/B&Bs**, about two thirds of the available roomnights were sold at a rate of nearly \$90 per night. Travelers typically traveled as parties of two and stayed two nights. Two thirds of the travelers were on pleasure trips and one quarter on business trips with three quarters of the rooms booked by Minnesota residents and one quarter by out-of-state travelers.

While **resort** unit rates were higher (\$155/night), the party size was likely to be four and they stayed three nights. About half the resort units offered were rented. Three quarters of resort guests were Minnesota residents.

Campground sites were rented at \$22 per night with an occupancy rate of 42%.

Campers traveled in parties of three and stayed an average of three nights. Three out of four campers were Minnesota residents.

5.2 Hotel/Motel/B&B Inventory

During June 2005 through May 2006, 251 properties with 9,197 rooms made 2.96 million roomnights available to the public and sold 1.81 million of those roomnights to travelers staying for fewer than 30 nights..

5.3 Room Rates and Occupancy

The overall average daily room rate at Northeast Region hotels/motels/B&Bs was \$88.95 during June 2005 through May 2006.

Hotels/motels//B&Bs had an average occupancy rate of 61%.

Table 5.3
Room Rates and Occupancy by Season
(Hotels/Motels/ B&Bs)

	June 2005- May 2006 <u>TOTAL</u>	June- August <u>2005</u>	September- November <u>2005</u>	December 2005- February <u>2006</u>	March- May <u>2006</u>
Average daily room rates*	\$88.95	\$114.12	\$83.62	\$86.11	\$77.39
Average occupancy*	61%	77%	63%	55%	50%
Total available roomnights (in millions)	2.96	0.77	0.75	0.70	0.74
Total occupied roomnights (in millions)	1.81	0.59	0.47	0.38	0.37

*The bases for these statistics are weighted by the number of rooms that are open in each quarter. Yearly averages are weighted by quarter.

Note: Average occupancy is calculated by taking total occupied roomnights as a percentage of total available roomnights, excluding from both figures any rooms rented for 30 nights or more.

5.4 Guest Party Size and Length of Stay

Hotel/motel/B&B property managers reported that their guests typically traveled in parties of two and stayed an average of two nights.

Table 5.4

**Management's Estimate:
Average Guest Party Size and Length of Stay by Season
(Hotels/Motels/B&Bs)**

	June 2005- May 2006 <u>TOTAL</u>	June- August <u>2005</u>	September- November <u>2005</u>	December 2005- February <u>2006</u>	March- May <u>2006</u>
Average party size*	2.35	2.57	2.32	2.30	2.26
Average length of stay*	1.95	2.00	2.05	1.93	1.81

*The bases for these statistics are weighted by the number of rooms that are open in each quarter. Yearly averages are weighted by quarter.

5.5 Guest Party Trip Purpose and Guest Origin

Hotel/motel/B&B property managers reported that were traveling for pleasure (67%). About one out of three guests were traveling either for business (25%) or to attend meetings and conventions (8%).

Managers reported that three in four of their guests were Minnesota residents (74%).

Table 5.5
Management's Estimate:
Trip Purpose and Guest Origin by Season
(Hotels/Motels/B&Bs)

	June 2005- May 2006 <u>TOTAL</u>	June- August <u>2005</u>	September- November <u>2005</u>	December 2005- February <u>2006</u>	March- May <u>2006</u>
Trip Purpose					
Pleasure	67%	73%	69%	68%	62%
Business	25%	22%	23%	25%	28%
Meetings/conventions	8%	5%	8%	8%	11%
Guest Origin					
<u>Out of state</u>	<u>26%</u>	<u>28%</u>	<u>25%</u>	<u>23%</u>	<u>30%</u>
U.S.	21%	22%	22%	20%	20%
Canada	5%	6%	2%	3%	9%
Other foreign	*	*	*	*	1%
Minnesota	74%	72%	75%	77%	70%

Note: Columns of figures may not add to totals shown due to rounding.

* Less than 0.5%

5.6 Resort Inventory

Some 286 resorts had 2,897 units available to the public. Resorts made 760,000 unitnights available over the 12-month period and sold 370,000 unitnights to guests who stayed fewer than 30 nights.

5.7 Unit Rates and Occupancy

The average unit rate for a resort was \$154.73 during the period June 2005 through May 2006.

Occupancy rates for resorts averaged 49%.

Table 5.7

Unit Rates and Occupancy by Season ***(Resorts)***

	June 2005- May 2006 <u>TOTAL</u>	June- August <u>2005</u>	September- November <u>2005</u>	December 2005- February <u>2006</u>	March- May <u>2006</u>
Average daily unit rates*	\$154.73	\$178.91	\$115.43	\$137.53	\$189.44
Average occupancy*	49%	73%	44%	39%	28%
Total available unitnights (in millions)	0.76	0.26	0.19	0.13	0.17
Total occupied unitnights (in millions)	0.37	0.19	0.08	0.05	0.05

*The bases for these statistics are weighted by the number of units that are open in each quarter. Yearly averages are weighted by quarter.

Note: Average occupancy is calculated by taking total occupied unitnights as a percentage of total available unitnights, excluding from both figures any units rented for 30 nights or more.

5.8 Guest Party Size and Length of Stay

Property managers of the Northeast Region resorts reported that guests at their locations usually traveled in groups of four and stayed three nights on average.

Table 5.8

**Management's Estimate:
Average Guest Party Size and Length of Stay By Season
(Resorts)**

	June 2005- May 2006 <u>TOTAL</u>	June- August <u>2005</u>	September- November <u>2005</u>	December 2005- February <u>2006</u>	March- May <u>2006</u>
Average travel party size	4.01	4.61	3.41	3.82	3.93
Average length of stay	3.40	5.01	3.57	2.38	2.73

5.9 Purpose of Trip and Guest Origin

According to property managers' estimates, virtually all resort guests (97%) were traveling on a pleasure trip.

Managers reported that three guests in four were Minnesota residents (79%), while the remaining guests lived outside the state.

Table 5.9
**Management's Estimate:
Trip Purpose and Guest Origin by Season
(Resorts)**

	June 2005- May 2006 <u>TOTAL</u>	June- August <u>2005</u>	September- November <u>2005</u>	December 2005- February <u>2006</u>	March- May <u>2006</u>
Purpose of guests' trip:					
Pleasure	97%	99%	99%	94%	96%
Business	3%	*	1%	5%	4%
Meetings/conventions	1%	*	--	1%	--
Guest Origin:					
<u>Out of State</u>	<u>21%</u>	<u>27%</u>	<u>26%</u>	<u>13%</u>	<u>22%</u>
U.S.	20%	26%	26%	12%	21%
Canada	1%	*	*	2%	*
Other Foreign	*	*	*	--	*
Minnesota	79%	73%	74%	87%	78%

Note: Columns of figures may not add to totals shown due to rounding.

* Less than 0.5%

5.10 Campground Inventory

The Northeast Region campground providers offered 6,980 sites in 180 campgrounds to the public for use during the 2005-06 year. That yielded a total of 1.39 million sitenights available, with 0.58 million sitenights sold to guests staying fewer than 30 nights.

Campgrounds on both public and private lands are included in the inventory.

5.11 Site Rates and Occupancy

The average rate for a campground site was \$22.31.

Occupancy rates for the Northeast Region campgrounds were 42%.

Table 5.11
Site Rates and Occupancy by Season
(Campgrounds)

	<u>June 2005- May 2006 TOTAL</u>	<u>June- August 2005</u>	<u>September- November 2005</u>	<u>December 2005- February 2006</u>	<u>March- May 2006</u>
Average site rate*	\$22.31	\$26.00	\$23.88	\$10.72	\$24.48
Average occupancy*	42%	66%	41%	1%	20%
Total available sitenights (in millions)	1.39	0.58	0.35	0.17	0.29
Total occupied sitenights (in millions)	0.58	0.38	0.14	**	0.06

*The bases for these statistics are weighted by the number of sites that are open in each quarter. Yearly averages are weighted by quarter.

**Less than 0.01 million.

Note: Average occupancy is calculated by taking total occupied sitenights as a percentage of total available sitenights, excluding from both figures any sites rented for 30 nights or more.

5.12 Guest Party Size and Length of Stay

The Northeast Region campers typically traveled in parties of three and spent an average of three nights while visiting, according to campground managers.

Table 5.12

**Management's Estimate:
Average Guest Party Size and Length of Stay by Season
(Campgrounds)**

	June 2005- May 2006 <u>TOTAL</u>	June- August <u>2005</u>	September- November <u>2005</u>	December 2005- February <u>2006</u>	March- May <u>2006</u>
Average travel party size	3.48	3.87	4.84	1.71	3.14
Average length of stay	3.41	3.89	5.68	0.86*	2.36

* Note: Includes campgrounds which were open but had no sites rented, resulting in an average length of stay less than 1 night.

5.13 Guest Origin

The Northeast Region campground managers reported that three in four Northeast Region campers (76%) were Minnesota residents.

Table 5.13
Management's Estimate:
Guest Origin by Season
(Campgrounds)

	June 2005- May 2006 <u>TOTAL</u>	June- August <u>2005</u>	September- November <u>2005</u>	December 2005- February <u>2006</u>	March- May <u>2006</u>
Guest Origin:					
<u>Out of State</u>	<u>24%</u>	<u>21%</u>	<u>41%</u>	<u>10%</u>	<u>21%</u>
U.S.	21%	19%	41%	--	21%
Canada	2%	2%	*	10%	*
Other Foreign	*	*	--	--	*
Minnesota	76%	79%	59%	90%	79%

Note: Columns of figures may not add to totals shown due to rounding.

* Less than 0.5%

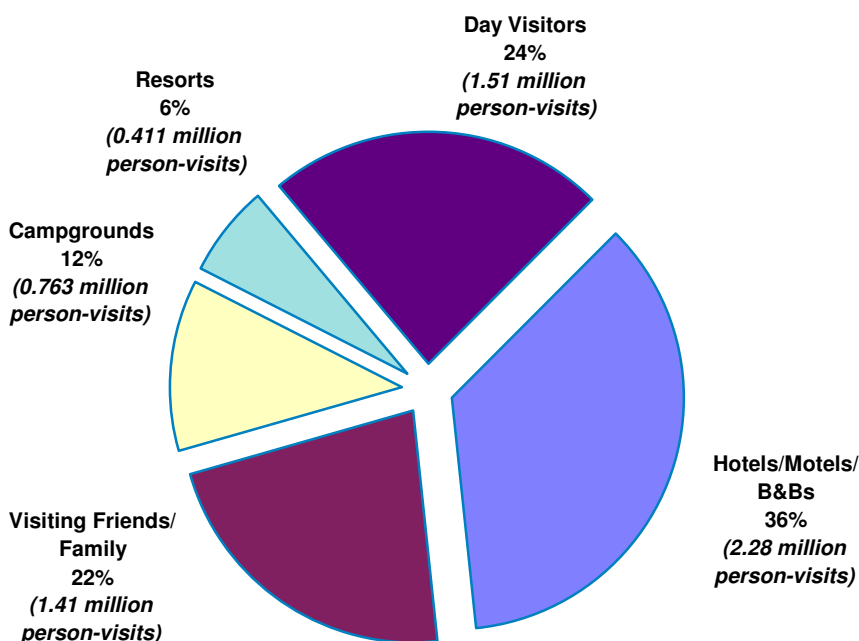
6.0 Travel Volume in the Northeast Region

Person-visits in the Northeast Region totaled 6.365 million during the period June 2005 through May 2006. A total of 4.86 million were overnight person visits – one person staying in one accommodation. In addition, day travelers in the Northeast Region were estimated at 1.51 million.

Hotel/motel/B&B guests represented 36% of person-visits while travelers staying with family and/or friends represented 22%. Campers accounted for 12% of person-visits, while travelers staying in resorts made up 6% of the person-visits in the Northeast Region in June 2005 through May 2006.

Figure 6.0

The Northeast Region Person-Visits



TOTAL: 6.365 Million Person-Visits

Note: A **person-visit** is classified in this report as one person on a day trip or one person staying overnight in one accommodation for one or more nights. For example, a couple on a three-night weekend is counted as two person-visits. If a guest to Minnesota travels to many locations in Minnesota, staying overnight in many different accommodations, each overnight stay is considered a person-visit. Therefore, 6.365 million person-visits should not necessarily be interpreted as 6.365 million travelers.

7.0 The Profile of the Northeast Region Travelers

This section details the findings concerning the profile of Northeast Region travelers overall and by each season during the period June 2005 – May 2006.

7.1 Demographic and Socioeconomic Profile

- The average age of Northeast Region travelers was 40.7 years. Travelers in the winter season (36.2 years) tended to be younger than travelers in all other seasons.
- The median household income was \$62,300.
- Nine travelers in ten identified themselves as white (93%).
- Nearly all Northeast Region travelers lived in the United States (98%) and three-fourths were residents of Minnesota (75%). Travelers in the Northeast Region resided in 20 different states. After Minnesota, the state showing the next highest proportion of Northeast Region visitors was Wisconsin (6%). Wisconsin visitors were more likely to visit during the spring (11%) than during the winter (2%).

**Table 7.1:
Demographic and Socioeconomic Profile**

	June 2005– May 2006 TOTAL	June– August 2005	September– November 2005	December 2005– February 2006	March– May 2006
Base:	356	140	86	49	82
Age:					
18 to 24	13%	13%	12%	19%	10%
25 to 29	11	11	7	13	14
30 to 39	23	25	18	27	23
40 to 49	26	23	27	29	28
50 to 59	15	15	18	8	18
60 to 64	5	6	7	1	4
65 and older	4	4	6	2	2
No Answer	3	3	5	1	1
Average Age	40.7	40.8	43.5	36.2	40.4
Income:					
Less than \$25,000	11%	8%	11%	15%	12%
\$25,000 to \$34,999	9	13	8	5	7
\$35,000 to \$49,999	14	17	11	10	14
\$50,000 to \$74,999	21	23	19	28	17
\$75,000 to \$99,999	16	16	13	15	20
\$100,000 to \$124,999	8	6	9	7	12
\$125,000 to \$149,999	4	3	4	4	5
\$150,000 or more	5	2	8	9	4
No Answer	12	12	18	7	8
Estimated Median Income	\$62,300	\$56,100	\$66,400	\$66,100	\$69,600
Gender:					
Male	52%	49%	55%	64%	49%
Female	44	48	42	26	50
No Answer	4	4	3	10	2
Racial/Ethnic Background:					
American Indian	2%	2%	3%	1%	2%
Asian	1	*	1	1	3
Black	1	*	3	*	*
Hispanic	1	2	2	*	1
White	93	95	90	96	92
Other	1	1	*	1	1
No Answer	2	1	3	1	2

* Less than 0.5%

**Table 7.1 (continued):
Demographic and Socioeconomic Profile**

	June 2005 – May 2006 <u>TOTAL</u>	June – August <u>2005</u>	September – November <u>2005</u>	December 2005 – February <u>2006</u>	March – May <u>2006</u>
Base:	356	140	86	49	82
Residence:					
<u>United States</u>	<u>98%</u>	<u>98%</u>	<u>99%</u>	<u>98%</u>	<u>95%</u>
Minnesota	75	72	79	77	75
Wisconsin	6	5	4	2	11
North Dakota	1	1	*	6	*
Iowa	2	4	2	*	2
South Dakota	*	1	*	*	*
Illinois	2	2	*	*	5
California	*	1	*	1	*
Texas	*	1	*	*	1
Other state	3	5	4	1	1
State not specified	10	10	11	13	6
Canada	1	2	1	1	2
Another Country	1	*	*	1	3
No Answer	*	*	*	*	1

* Less than 0.5%

Note: States with responses less than 2% among the total sample have been aggregated into the "Other state" category.

7.2 Travel Party and Trip Profile

Travel Party

- Three-fourths of travelers to the Northeast Region were on a vacation or short pleasure trip (75%), while nearly one in five was traveling for personal reasons, e.g., wedding, funeral, medical, etc. (17%).

Travelers in the fall season were the least likely to be traveling for a vacation or short pleasure trip (57%) and the most likely to be traveling for business or work (19%). Fall season travelers (23%) were more likely than summer season travelers (14%) to be visiting the Northeast Region for personal reasons.

- The average travel party size was 2.9 people. Summer (39%) and fall (48%) season travelers were more likely than spring travelers (27%) to be traveling in parties of two. Winter travelers (17%) were more likely than summer travelers (7%) to be traveling alone.
- The average number of nights travelers intended to stay overnight was 2.8 nights. The length of stay was longer in the summer (3.1 nights) than it was in the winter (2.3 nights).
- Two-thirds of Northeast Region travelers had no children younger than 18 in their travel party (65%). Fall (77%) and winter (69%) season travelers were more likely than summer (57%) season travelers to be traveling without children.
- The vast majority of Northeast Region travelers had taken a trip in Minnesota in the last five years (91%), with an estimated median of 7 trips among these travelers.

Prior trip frequency was higher among spring season travelers (estimated median of 9.3 trips) than it was among summer season travelers (estimated median of 5.7 trips). Fall (38%) and spring (45%) season travelers were more likely than summer

(21%) and winter (25%) travelers to have taken more than 10 trips in Minnesota in the last five years.

Trip Profile

- Seven travelers in ten (69%) in the Northeast Region stayed in *paid* accommodations on their trip, primarily in hotels/motels/historic inns (50%). One-tenth stayed in *unpaid* accommodations (9%).

Fall (59%) and winter (64%) season travelers were more likely to stay in a hotel/motel/historic inn than summer travelers were (41%). Fall season travelers were the least likely to have stayed at a resort (2%). Summer (6%) and spring (9%) travelers were more likely to have stayed in a tent at a campground than fall and winter travelers were (1% each). Summer (5%) and spring (7%) travelers were more likely than fall travelers (1%) to have stayed in a vacation home/condo/cabin/houseboat that they rented.

One fifth of travelers in the Northeast Region said they were taking a day trip (22%) and did not stay in any type of overnight accommodations on their trip. Summer travelers (26%) were more likely than spring travelers (16%) to have taken a day trip.

- Travelers participated in numerous activities during their trip. Dining out (66%), shopping (47%), sightseeing or driving for pleasure (45%), and driving on designated scenic byways (34%) were among the most frequently mentioned trip activities.

General Activities

Dining out was a key activity for travelers in all seasons (66%). Sightseeing or driving for pleasure was more prevalent among summer (62%) and spring (57%) season travelers than it was among fall (22%) and winter (15%) season travelers.

This same pattern was true for taking in city sites, where 40% of summer travelers

and 30% of spring travelers took in the city sites versus 16% of fall travelers and 11% of winter travelers. Casino gaming was more often a winter activity (29%). Fall travelers were more likely than summer travelers to enjoy the Northeast Region's nightlife or evening entertainment (23% versus 11%) and viewing fall colors (14% versus 2%).

Visiting People or Places

Two thirds of Northeast Region travelers were visiting people or places during their trip (65%). One-third indicated they were visiting state or national parks (31%) or historic sites (29%). One in five said they were visiting other museums (22%) or friends or relatives (21%). Winter season travelers were least likely to visit the following:

- Historic sites (4%),
- Other museums (2%), and
- Friends or relatives (7%).

Summer (9%) and spring (10%) season travelers were more likely to have visited art museums than fall season travelers (3%). Amusement parks and carnivals were more popular among summer travelers (10%) than fall (4%) and winter (2%) travelers.

Active Recreation

Nearly two-thirds of Northeast Region travelers participated in "active" recreation (61%). The array of activities was diverse, with hiking (31%) and pool swimming (19%) topping the list. Fall season travelers were the least likely to participate in any active recreation (49%).

Hiking (3%) and pool swimming (7%) were least popular among winter season travelers. Summer travelers were more likely than fall travelers to participate in:

- Wildlife viewing or bird watching (19% versus 4%),
- Biking (12% versus 4%), and
- Lake/river swimming (14% versus 4%).

As would be expected, canoeing was more popular among summer (8%) and spring (6%) travelers, while downhill skiing/snowboarding and snowmobiling were more popular among winter travelers (36% and 22%, respectively).

Shopping

Nearly half of Northeast Region travelers did some type of shopping on their trip (47%), mostly for gifts or souvenirs (32%).

Shopping was least popular among winter visitors (24%). In addition, shopping for arts, crafts, and antiques was least popular among winter visitors (4%). Spring (40%) and summer (40%) season travelers were more likely than fall (21%) and winter (13%) season travelers to have shopped for gifts or souvenirs. General or mall shopping was more prevalent among fall visitors (22%) as compared with summer (11%) and winter (7%) visitors.

Attending Events

One-fourth of travelers indicated that they attended an “event” while on their trip in the Northeast Region. The incidence of attending an event was higher among fall and winter travelers (42% and 33%, respectively) than among summer and spring travelers (16% and 15%, respectively).

Fall visitors were more likely than summer visitors to attend amateur sporting events (18% versus 3%), fairs or festivals (16% versus 7%), and professional sporting events (12% versus 1%). Amateur sporting events were also popular among winter visitors (22%), as compared with summer (3%) and spring (3%) visitors.

**Table 7.2:
Travel Party and Trip Profile**

	June 2005 – May 2006 <u>TOTAL</u>	June – August <u>2005</u>	September – November <u>2005</u>	December 2005 – February <u>2006</u>	March – May <u>2006</u>
Base:	356	140	86	49	82
Trip Purpose (multi-response):					
Vacation or short pleasure trip	75%	84%	57%	72%	79%
Personal (e.g., wedding, funeral, medical, etc)	17	14	23	20	17
Convention or conference	2	1	3	6	3
Business or work	8	3	19	3	7
No Answer	2	2	3	4	1
Travel Party Size:					
1 person	11%	7%	9%	17%	15%
2 people	38	39	48	33	27
3 to 4 people	35	37	30	33	38
5 or more people	16	16	13	18	18
Average Travel Party Size	2.9	3.0	2.8	2.9	3.0
Total Trip Length of Stay:					
Daytripper	22%	26%	23%	18%	16%
1 night	14	15	16	18	9
2 nights	32	21	27	43	50
3 to 6 nights	27	32	30	19	21
7 or more nights	5	6	4	3	5
Average Nights (Excluding Daytrippers)	2.8	3.1	2.7	2.3	2.8
Children in Travel Party					
One or more children under 18 years old	35%	43%	23%	31%	35%
No children	65	57	77	69	63
Ages of Children in Travel Party					
<i>Younger than 6 years old</i>					
None	87%	83%	96%	97%	81%
One or more	13	17	4	3	19
<i>6 to 11 years old</i>					
None	85%	80%	88%	91%	87%
One or more	15	20	12	9	13
<i>12 to 17 years old</i>					
None	81%	77%	89%	75%	83%
One or more	19	23	11	25	16

* Less than 0.5%

**Table 7.2 (continued):
Travel Party and Trip Profile**

	June 2005– May 2006 <u>TOTAL</u>	June – August <u>2005</u>	September – November <u>2005</u>	December 2005 – February <u>2006</u>	March – May <u>2006</u>
Base:	356	140	86	49	82
Minnesota Trips in Last 5 Years					
None	7%	10%	6%	3%	5%
1 trip	4	7	*	3	3
2 to 4 trips	26	28	23	37	20
5 to 10 trips	30	33	30	28	27
More than 10 trips	31	21	38	25	45
No Answer	2	2	3	4	*
Estimated Median Trips	7.0	5.7	8.3	6.3	9.3
Lodging:					
<u>Paid Accommodations</u>	<u>69%</u>	<u>65%</u>	<u>67%</u>	<u>77%</u>	<u>72%</u>
Hotel/Motel/Historic Inn	50	41	59	64	48
Resort	6	6	2	8	8
Bed & Breakfast	1	1	*	1	*
Vacation home/condo/cabin/houseboat you rented	4	5	1	2	7
In a tent at a campground	5	6	1	1	9
In an RV at a campground	4	6	4	*	1
<u>Unpaid Accommodations</u>	<u>9%</u>	<u>9%</u>	<u>10%</u>	<u>6%</u>	<u>12%</u>
Home of family or friends	6	5	7	3	10
Vacation home/condo/cabin/houseboat of family or friend	1	2	1	2	*
At your vacation home/condo/cabin/houseboat	1	2	2	*	2
At a campground with no fee	1	1	*	1	*
<u>Day tripper</u>	<u>22%</u>	<u>26%</u>	<u>23%</u>	<u>18%</u>	<u>16%</u>
Activities:					
<u>General (checked one or more below)</u>	<u>86%</u>	<u>86%</u>	<u>82%</u>	<u>81%</u>	<u>93%</u>
Dining out	66	68	70	64	62
Sightseeing or driving for pleasure	45	62	22	15	57
Driving on designated scenic byways	34	44	19	13	43
Taking in city sites	28	40	16	11	30
Nightlife or evening entertainment	16	11	23	16	17
Casino gaming	14	9	13	29	15
Viewing fall colors	4	2	14	*	*

* Less than 0.5%

**Table 7.2 (continued):
Travel Party and Trip Profile**

	June 2005– May 2006 <u>TOTAL</u>	June – August <u>2005</u>	September – November <u>2005</u>	December 2005 – February <u>2006</u>	March – May <u>2006</u>
Base:	356	140	86	49	82
<u>Visiting (checked one or more below)</u>	<u>65%</u>	<u>84%</u>	<u>49%</u>	<u>15%</u>	<u>79%</u>
State or national parks	31	43	12	6	48
Historic sites	29	43	12	4	39
Other museums	22	33	12	2	23
Friends or relatives	21	23	31	7	17
Art museums	7	9	3	*	10
Amusement parks or carnivals	6	10	4	2	7
Indian areas	3	5	2	2	3
Indoor water parks	2	2	2	4	3
Outdoor water parks	2	3	2	*	*
Other attraction	2	2	2	1	3
<u>Participating In (checked one or more below)</u>	<u>61%</u>	<u>62%</u>	<u>49%</u>	<u>57%</u>	<u>75%</u>
Hiking	31	41	15	3	45
Pool swimming	19	22	20	7	21
Wildlife viewing or bird watching	11	19	4	*	12
Biking	8	12	4	*	10
Fishing	8	10	8	*	10
Lake/river swimming	7	14	4	*	3
Downhill skiing or snowboarding	7	*	6	36	3
Snowmobiling	6	*	12	22	3
Canoeing	5	8	4	1	6
Golfing	4	6	4	*	3
Off-road ATV driving	3	2	5	2	4
Motor boating/water skiing	2	2	3	*	1
Cross-country skiing	2	*	3	13	*
Ice Fishing	2	*	*	7	3
Hunting	2	*	5	*	3
Jet skiing	1	1	1	*	3
Other activity	4	4	2	2	5
<u>Shopping (checked one or more below)</u>	<u>47%</u>	<u>52%</u>	<u>43%</u>	<u>24%</u>	<u>53%</u>
For gifts or souvenirs	32	40	21	13	40
General or mall shopping	14	11	22	7	14
Arts, crafts, or antiques	12	14	14	4	12
Outlet shopping	6	7	7	3	3
At the Mall of America	3	2	2	3	4

* Less than 0.5%

**Table 7.2 (continued):
Travel Party and Trip Profile**

	June 2005– May 2006 <u>TOTAL</u>	June – August <u>2005</u>	September – November <u>2005</u>	December 2005 – February <u>2006</u>	March – May <u>2006</u>
Base:	356	140	86	49	82
<u>Attending (checked one or more below)</u>	<u>24%</u>	<u>16%</u>	<u>42%</u>	<u>33%</u>	<u>15%</u>
Amateur sporting events	9	3	18	22	3
Fairs or festivals	8	7	16	*	5
Theater performances	4	5	5	*	3
Popular music concerts or shows	3	1	2	6	6
Professional sporting events	3	1	12	3	*
Classical music concerts	1	1	2	1	2
Other events	1	2	1	1	2
No Answer	2	1	4	4	*

* Less than 0.5%

Appendix A: Procedures

Technical Appendix: The Research Procedures

Introduction

The basic procedure employed in this project is the T-MAP-I economic impact model. *Davidson-Peterson Associates* first employed this procedure in 1985 for the State of Georgia. Since then, it has been used to estimate traveler expenditures in states and local areas throughout the United States.

A. What is Economic Impact?

Economic impact begins when a traveler to an area spends any amount of money on any product or service in that area. The **direct** recipients of traveler expenditures use these dollars to earn income, pay wages, and pay taxes, thus, creating a **direct impact** on the local economy. But the benefits to the local economy extend beyond the direct impact of these dollars. Traveler expenditures create a chain effect. When businesses and their employees spend *their* income in the state, they create an **indirect impact** by supporting additional jobs, wages, salaries, proprietary income and tax revenues. The sum of the **direct** and **indirect impact** equals the total economic impact of traveler expenditures.

B. What is a Traveler?

For purposes of this study, a traveler is anyone who stays overnight one to 29 nights or who is on a day trip in an area that is at least 50 miles from their primary residence. Travelers may be motivated to travel by pleasure, personal, or business reasons or some combination of reasons. If they remain in the area for more than 30 days, they cease being a traveler. If they are staying in accommodations contracted for more than a 30-day period (construction workers or truck drivers, for example), they are not classified as travelers and the rooms they occupy are not included in those occupied by travelers.

This report and the T-MAP-I procedure are based on the premise that economic impact begins with the expenditure of dollars by travelers (bottom-up measurement) rather than receipts of selected businesses (top-down measurement) – a more traditional tool of economic analysis.

Davidson-Peterson Associates does **not** use the traditional top-down or industry receipts-based. In this study:

- Sales tax data or industry receipts are not employed;
- Measurements begin with **every dollar** travelers spend;
- North American Industry Classification System (NAICS) codes are **not** used;
- **Travelers** define where they spend money.

C. Additional Explanations

- Top-down or industry receipts-based measures assume that an industry is composed of a set of businesses that are clearly designated by customary NAICS codes. For most industries this works well. However, when applied to tourism, this method tends to underestimate the economic impact, in part, because businesses are not able to separate traveler expenditures from resident expenditures.
- Tourism is not a typical industry, and cannot be represented in its entirety by a few NAICS-classified businesses. Tourism is the movement of people into an area for a brief period of time. Its economic impact begins with the sum of every dollar travelers spend on lodging, retail purchases, gas, food, entertainment or any other goods or services people buy.
- When travelers spend dollars, they spend them in many of the same “traditional industries” as local residents. While these businesses (such as retail stores, restaurants and gas stations) are identified by NAICS codes, there is simply no way to separate the purchases of travelers from those of local residents. The bottom-up procedure employed by *Davidson-Peterson Associates* is based on all traveler expenditures in all industries.

This procedure for assessing economic impact provides accurate estimates of current numbers as well as measurements of change from year to year. Methods and numbers

are constantly being reviewed to generate the most accurate measures of change possible.

D. The Basic Research Steps for the 2005-2006 Northeast Region Effort

What follows is a brief description of the procedures for estimating economic impact as they were completed in 2005-06.

1. Inventory Update

Early in the study design, Davidson-Peterson Associates received a copy of the inventory of lodging properties maintained by Explore Minnesota Tourism.

2. Sampling

For each quarter, open properties in each of three categories (hotels/motels/B&Bs, resorts, and campgrounds) were arrayed by size and cumulative totals calculated. A random number was used to select the first property and a skip pattern developed to identify 400 properties for interviewing chosen with size taken into account. Since the quarters were sampled independently some large properties were selected more than once but all open properties had a chance of being selected each quarter.

3. Seasonal Surveys of Paid Lodging Business Activity

Every property included in the regional survey sample was contacted and asked to complete a survey questionnaire by phone. Those who did not participate by phone were asked to complete the survey via mail or fax. Additional properties in the Duluth area participating in a special economic impact study are added to the region sample. A total of 915 quarterly surveys were conducted:

<u>Seasonal</u>	<u># Interviewed</u>
June - August	212
September - November	211
December - February	242
March - May	250

4. Resident (VFR) Survey

To determine the incidence of visiting friends and relatives (VFR) in the state, telephone interviews were conducted with a random sample of Minnesota households. Data from these surveys was projected to the total state household population.

A total of 1,001 VFR surveys were completed in during the June 2005 through May 2006 period. The proportion of visitor days per household was applied to the total households in the Northeast Region.

5. Traveler Expenditure Survey/Modeling

To represent the proportion of traveler expenditures spent on specific types of goods and services, travelers were surveyed on-site while in Minnesota. The traveler expenditure ratios obtained from the on-site interviews were applied to derive the total expenditures by category.

A total of 2,292 Traveler Expenditure surveys were completed during the period June 2005 through May 2006 at a variety of sites across Minnesota. Sites were chosen by selecting a county and zip code for each region based on the array of properties by size. Essentially the counties where a sizable volume of overnight accommodations exist to serve travelers had a greater chance to be selected. Within the selected zip codes, an array of sites were chosen to maximize the ability to find a variety of tourists on site.

Roughly equal proportions of interviews were completed in each of the four Explore Minnesota Tourism regions. Of the 2,292 questionnaires, a small number were excluded from the economic impact sample due to their failure to complete all five questions necessary to include their responses in the model. The combined total of 2,274 was used to calculate the expenditure ratios for the state and for each of the four regions. However, the 524 surveys conducted in the Northeast Region were the basis for the traveler in this region.

6. Economic Impact Data Calculations

Room, unit and campsite rates and occupancy were used to estimate the total expenditures at each type of accommodation. The traveler expenditure ratios were applied to this figure to derive the total traveler expenditures by those staying in each type of accommodation, in each region, and in each season.

7. Input/Output (I/O) Modeling

A special inter-industry model constructed for Minnesota utilizes the total tourism expenditures to determine estimates of employment, income, and government revenue impacts of expenditures on the state both direct and total. Models were also developed for each of the four tourism regions. Please note that the regional impacts will not add to the state totals. Revenue leaked from one region to another is excluded from the region totals but included in the state total.

E. Additional Procedures for the Northeast Region Traveler Profile Study

To reflect seasonal and regional visitation patterns more accurately, Davidson-Peterson Associates balanced the sample of travelers from the Traveler Expenditure Survey according to the person-visit estimates from the economic impact portion of the research study. With this modest weighting, the annual traveler profile study results are based on a sample of travelers in Minnesota which is balanced so as to be directly proportional to the estimated number of travelers by region and season.

The table on the following page shows the distribution across season and region for the following:

- The estimated proportion of person-visits in each season by region;
- The number of interviews completed in each season by region;
- The weights applied to the interviews to balance the sample to the desired number of interviews in each season by region; and
- The number of interviews in the balanced sample so that the proportion matches the person-visits proportion in each season by region.

**Sample Balancing by
Estimated Proportion of Person-Visits**

	Proportion of Person- Visits	Actual Completes	Weights Applied	Balanced Completes
<u>Summer 2005</u>	<u>38.0%</u>	<u>869</u>		<u>872</u>
Metro	16.3%	248	1.508	374
Northcentral/West	8.0%	233	0.786	183
Southern	7.6%	199	0.878	175
Northeast	6.1%	189	0.742	140
<u>Fall 2005</u>	<u>23.6%</u>	<u>449</u>		<u>541</u>
Metro	10.6%	113	2.158	244
Northcentral/West	5.0%	102	1.130	115
Southern	4.2%	121	0.798	97
Northeast	3.8%	113	0.759	86
<u>Winter 2005-2006</u>	<u>16.3%</u>	<u>472</u>		<u>374</u>
Metro	7.9%	137	1.324	181
Northcentral/West	3.3%	117	0.643	75
Southern	3.0%	111	0.613	68
Northeast	2.1%	107	0.456	49
<u>Spring 2006</u>	<u>22.0%</u>	<u>502</u>		<u>505</u>
Metro	9.9%	136	1.674	228
Northcentral/West	4.7%	142	0.755	107
Southern	3.8%	109	0.811	88
Northeast	3.6%	115	0.710	82
<u>Total</u>	<u>100.0%</u>	<u>2,292</u>		<u>2,292</u>
Metro	44.8%	634		1027
Northcentral/West	21.0%	594		481
Southern	18.7%	540		428
Northeast	15.5%	524		356

A sample of 524 is considered accurate to plus or minus 4.3 percentage points at the 95% confidence level. The following tables show the confidence levels at 95% for each season:

Confidence Intervals by Season

Season	Actual Sample Size	Confidence Intervals
Summer 2005	189	± 7.1
Fall 2005	113	± 9.2
Winter 2005-2006	107	± 9.5
Spring 2006	115	± 9.1
Total	524	± 4.3

Appendix B: Supporting Tables

Table B-1

**Estimated Traveler Expenditures
By Category of Expenditure and
Accommodation Used
June 2005 through May 2006
(\$ Millions)**

***** Paid Accommodations *****

* No Lodging Expense *

	<u>Hotels/ Motels/ B&Bs</u>	<u>Resorts</u>	<u>Camp- grounds</u>	<u>Visiting Friends/ Relatives</u>	<u>Day Tripper</u>	<u>Total</u>
Food	\$158.84	\$80.46	\$32.38	\$129.40	\$11.19	\$412.27
<u>Shopping</u>	<u>\$178.15</u>	<u>\$44.75</u>	<u>\$52.19</u>	<u>\$112.66</u>	<u>\$11.23</u>	<u>\$398.99</u>
General	105.94	24.17	32.50	81.58	4.94	249.14
Traveler	72.21	20.58	19.69	31.08	6.29	149.85
<u>Recreation</u>	<u>\$166.81</u>	<u>\$59.61</u>	<u>\$52.61</u>	<u>\$113.63</u>	<u>\$16.36</u>	<u>\$409.01</u>
Liquor	32.38	21.08	10.99	37.62	1.26	103.33
Historic	6.09	1.56	5.00	4.08	0.57	17.29
Sightseeing	11.80	0.93	3.19	1.59	0.60	18.12
Event fees	25.40	1.53	10.05	9.48	2.43	48.89
Sport fees	20.96	11.21	5.38	15.98	3.04	56.58
Cultural event fees	3.76	0.00	0.20	6.81	0.32	11.09
Evening entertainment	16.15	3.23	7.25	16.64	0.55	43.84
Licenses	6.54	14.36	5.74	10.66	0.34	37.64
Sweepstakes	2.70	2.33	0.56	1.97	0.49	8.05
Wagering	40.57	3.32	3.75	7.96	6.73	62.33
Other	0.45	0.05	0.49	0.84	0.02	1.85
Lodging	\$175.75	\$59.20	\$14.37	--	--	\$249.31
Ground Transportation	\$71.83	\$30.04	\$28.93	\$60.71	\$4.52	\$196.03
Total	\$751.38	\$274.06	\$180.47	\$416.40	\$43.31	\$1,665.61

Note: Columns of figures may not add to totals shown due to rounding.

Table B-2
**Estimated Traveler Expenditures
 By Season**
June 2005 through May 2006
(\$ Millions)

	June-August 2005	September- November 2005	December 2005- February 2006	March-May 2006	Total
Food	\$187.06	\$87.88	\$57.61	\$79.73	\$412.27
<u>Shopping</u>	<u>\$180.76</u>	<u>\$88.23</u>	<u>\$55.65</u>	<u>\$74.36</u>	<u>\$398.99</u>
General	112.35	55.05	34.36	47.37	249.14
Traveler	68.40	33.18	21.28	26.98	149.85
<u>Recreation</u>	<u>\$187.79</u>	<u>\$88.99</u>	<u>\$55.55</u>	<u>\$76.68</u>	<u>\$409.01</u>
Liquor	47.93	21.76	13.52	20.11	103.33
Historic	8.54	3.82	1.92	3.01	17.29
Sightseeing	8.15	4.19	2.67	3.11	18.12
Event fees	22.44	11.17	6.60	8.68	48.89
Sport fees	26.03	12.12	7.86	10.56	56.58
Cultural event fees	4.54	2.38	1.53	2.63	11.09
Evening entertainment	20.08	9.69	5.71	8.36	43.84
Licenses	19.07	7.40	4.18	7.00	37.64
Sweepstakes	3.77	1.67	1.10	1.51	8.05
Wagering	26.36	14.35	10.22	11.40	62.33
Other	0.89	0.42	0.22	0.32	1.85
Lodging	\$110.66	\$55.12	\$40.59	\$42.94	\$249.31
Transportation	\$91.30	\$42.24	\$25.36	\$37.14	\$196.03
Total	\$757.56	\$362.46	\$234.75	\$310.84	\$1,665.61

Note: Columns of figures may not add to totals shown due to rounding.

Seasonal Analysis

	June- August 2005	September- November 2005	December 2005 – February 2006	March – May 2006
Share of seasonal expenditures	46%	22%	14%	19%
Share of days in year	25%	25%	25%	25%
Ratio	1.80	0.87	0.57	0.74

Table B-3

**Estimated Impact of Traveler Expenditures
on the Economy of the Northeast Region
June 2005 through May 2006**

	<u>Direct Impact</u>	<u>Total Impact</u>
Employment (full-time job equivalents)	30,300	40,200
Resident Income (wages, salaries, and proprietary income)	\$458,400,000	\$711,200,000
Government Revenues:		
State government revenues	\$140,100,000	\$203,600,000
Local government revenues	\$45,300,000	\$68,200,000

STATISTICAL DIFFERENCES

The Profile of Northeast Region Travelers

When appropriate, significant differences at the 95% confidence level are noted in the findings. Tests of significance are statistical methods for measuring the likelihood that observed relationships in a sample are the result of real differences between the groups and not sampling error. Thus, when we state that two numbers are statistically different at the 95% confidence level, we are saying that if we were to sample the universe 100 times, at least 95 times out of 100 the samples observed would be different. In contrast, fewer than five times out of 100 there would not be any difference between the observed numbers.

The following is an example of how these tables can be interpreted and used. The proportion of male respondents during the winter (64%) was significantly higher than the proportion of male respondents during the summer (49%) and spring (49%).

Table B-4

Demographic and Socioeconomic Profile
Statistical Differences by Season

	June 2005– May 2006 <u>TOTAL</u>	June- August <u>2005</u> a	September – November <u>2005</u> b	December 2005 – February <u>2006</u> c	March – May <u>2006</u> d
Base:	356	140	86	49	82
Age:					
50 to 59	15	15	18c	8	18c
60 to 64	5	6c	7c	1	4
Average Age	40.7	40.8c	43.5c	36.2	40.4c
Income:					
\$25,000 to \$34,999	9	13c	8	5	7
\$150,000 or more	5	2	8a	9a	4
No Answer	12	12	18cd	7	8
Gender:					
Male	52%	49%	55%	64%ad	49%
Female	44	48c	42c	26	50c
No Answer	4	4	3	10abd	2
Residence:					
Wisconsin	6	5	4	2	11c
Other state	3	5cd	4	1	1
State not specified	10	10	11	13d	6

Note: States with responses less than 2% among the total sample have been aggregated into the “Other state” category.

Note: Shaded percents/numbers are significantly different at the 95% confidence level than the percents/numbers in columns indicated by shaded letters.

Table B-5

Travel Party and Trip Profile
Statistical Differences by Season

	June 2005– May 2006 TOTAL	June-August 2005 a	September- November 2005 b	December 2005 – February 2006 c	March – May 2006 d
Base:	356	140	86	49	82
Trip Purpose (multi-response):					
Vacation or short pleasure trip	75%	84%bc	57%	72%b	79%b
Personal (e.g., wedding, funeral, medical, etc)	17	14	23a	20	17
Business or work	8	3	19acd	3	7
Travel Party Size:					
1 person	11%	7%	9%	17%a	15%
2 people	38	39d	48cd	33	27
Total Trip Length of Stay:					
Daytripper	22%	26%d	23%	18%	16%
1 night	14	15	16	18d	9
2 nights	32	21	27	43ab	50ab
3 to 6 nights	27	32cd	30c	19	21
Average Nights (Excluding Daytrippers)	2.8	3.1c	2.7	2.3	2.8
Children in Travel Party					
One or more children under 18 years old	35%	43%bc	23%	31%	35%b
No children	65	57	77ad	69a	63
Ages of Children in Travel Party					
<i>Younger than 6 years old</i>					
None	87%	83%	96%ad	97%ad	81%
One or more	13	17bc	4	3	19bc
<i>6 to 11 years old</i>					
None	85%	80%	88%	91%a	87%
One or more	15	20c	12	9	13
<i>12 to 17 years old</i>					
None	81%	77%	89%ac	75%	83%
One or more	19	23b	11	25b	16

Table B-5 (continued)

Travel Party and Trip Profile
Statistical Differences by Season

	June 2005– May 2006 <u>TOTAL</u>	June– August 2005 <u>a</u>	September – November 2005 <u>b</u>	December 2005 – February 2006 <u>c</u>	March – May 2006 <u>d</u>
Base:	356	140	86	49	82
Minnesota Trips in Last 5 Years					
None	7%	10% ^c	6%	3%	5%
1 trip	4	7 ^d	*	3	3
2 to 4 trips	26	28	23	37 ^{bd}	20
More than 10 trips	31	21	38 ^{ac}	25	45 ^{ac}
Estimated Median Trips	7.0	5.7	8.3	6.3	9.3^a
Lodging:					
<u>Paid Accommodations</u>	<u>69%</u>	<u>65%</u>	<u>67%</u>	<u>77%^a</u>	<u>72%</u>
Hotel/Motel/Historic Inn	50	41	59 ^a	64 ^{ad}	48
Resort	6	6 ^b	2	8 ^b	8 ^b
Vacation home/condo/cabin/houseboat you rented	4	5 ^b	1	2	7 ^b
In a tent at a campground	5	6 ^{bc}	1	1	9 ^{bc}
In an RV at a campground	4	6 ^d	4	*	1
<u>Unpaid Accommodations</u>	<u>9%</u>	<u>9%</u>	<u>10%</u>	<u>6%</u>	<u>12%</u>
Home of family or friends	6	5	7	3	10 ^c
Day tripper	22%	26% ^d	23%	18%	16%
Activities:					
<u>General (checked one or more below)</u>	<u>86%</u>	<u>86%</u>	<u>82%</u>	<u>81%</u>	<u>93%^{abc}</u>
Sightseeing or driving for pleasure	34	62 ^{bc}	22	15	57 ^{bc}
Driving on designated scenic byways	34	44 ^{bc}	19	13	43 ^{bc}
Taking in city sites	28	40 ^{bc}	16	11	30 ^{bc}
Nightlife or evening entertainment	16	11	23 ^a	16	17
Casino gaming	14	9	13	29 ^{abd}	15
Viewing fall colors	5	2	14 ^a	*	*
<u>Visiting (checked one or more below)</u>	<u>65%</u>	<u>84%^{bc}</u>	<u>49%^c</u>	<u>15%</u>	<u>79%^{bc}</u>
State or national parks	31	43 ^{bc}	12	6	48 ^{bc}
Historic sites	29	43 ^{bc}	12 ^c	4	39 ^{bc}
Other museums	22	33 ^{bc}	12 ^c	2	23 ^{bc}
Friends or relatives	21	23 ^c	31 ^{cd}	7	17 ^c
Art museums	7	9 ^b	3	*	10 ^b
Amusement parks or carnivals	6	10 ^{bc}	4	2	7

*Less than 5%.

Table B-5 (continued)

Travel Party and Trip Profile
Statistical Differences by Season

	June 2005– May 2006 TOTAL	June- August 2005 a	September- – November 2005 b	December 2005 – February 2006 c	March – May 2006 d
Base:	356	140	86	49	82
<u>Participating In (checked one or more below)</u>	<u>61%</u>	<u>62%^b</u>	<u>49%</u>	<u>57%^b</u>	<u>75%^{abc}</u>
Hiking	31	41 ^{bc}	15 ^c	3	45 ^{bc}
Pool swimming	19	22 ^c	20 ^c	7	21 ^c
Wildlife viewing or bird watching	11	19 ^b	4	*	12 ^b
Biking	8	12 ^b	4	*	10
Lake/river swimming	7	14 ^{bd}	4	*	3
Downhill skiing or snowboarding	7	*	6	36 ^{bd}	3
Snowmobiling	6	*	12 ^d	22 ^{bd}	3
Canoeing	5	8 ^c	4	*	6 ^c
Cross-country skiing	2	*	3	13 ^b	*
<u>Shopping (checked one or more below)</u>	<u>47%</u>	<u>52%^c</u>	<u>43%^c</u>	<u>24%</u>	<u>53%^c</u>
For gifts or souvenirs	32	40 ^{bc}	21	13	40 ^{bc}
General or mall shopping	14	11	22 ^{ac}	7	14
Arts, crafts, or antiques	12	14 ^c	14 ^c	4	12 ^c
<u>Attending (checked one or more below)</u>	<u>24%</u>	<u>16%</u>	<u>42%^{ad}</u>	<u>33%^{ad}</u>	<u>15%</u>
Amateur sporting events	9	3	18 ^{ad}	22 ^{ad}	3
Fairs or festivals	8	7	16 ^{ad}	*	5
Popular music concerts or shows	3	1	2	6	6 ^a
Professional sporting events	3	1	12 ^{ac}	3	*

*Less than 5%.

Appendix C: Minnesota Tourism Regions

MINNESOTA TOURISM REGIONS



COUNTIES WITHIN MINNESOTA'S TOURISM REGIONS

<u>Twin Cities Metro</u>	<u>Northeast</u>	<u>Northcentral/West</u>	<u>Southern</u>
Anoka	Aitkin	Becker	Big Stone
Carver	Carlton	Beltrami	Blue Earth
Chisago	Cook	Benton	Brown
Dakota	Isanti	Cass	Chippewa
Hennepin	Itasca	Clay	Cottonwood
Ramsey	Kanabec	Clearwater	Dodge
Scott	Koochiching	Crow Wing	Faribault
Washington	Lake	Douglas	Fillmore
Wright	Pine	Grant	Freeborn
	St. Louis	Hubbard	Goodhue
		Kittson	Houston
		Lake of Woods	Jackson
		Mahnomen	Kandiyohi
		Marshall	Lac qui Parle
		Mille Lacs	Le Sueur
		Morrison	Lincoln
		Norman	Lyon
		Otter Tail	McLeod
		Pennington	Martin
		Polk	Meeker
		Pope	Mower
		Red Lake	Murray
		Roseau	Nicollet
		Sherburne	Nobles
		Stearns	Olmsted
		Stevens	Pipestone
		Todd	Redwood
		Wadena	Renville
		Wilkin	Rice
			Rock
			Sibley
			Steele
			Swift
			Traverse
			Wabasha
			Waseca
			Watsonwan
			Winona
			Yellow Medicine

Appendix D: Survey Instruments

Minnesota 2005/2006 Lodging Managers Survey – Quarter 3

Date: _____ Date: _____ Date: _____ Date: _____ Date: _____ Date: _____
 Time: _____ Time: _____ Time: _____ Time: _____ Time: _____ Time: _____
 Status: _____ Status: _____ Status: _____ Status: _____ Status: _____ Status: _____
 Intvr: _____ Intvr: _____ Intvr: _____ Intvr: _____ Intvr: _____ Intvr: _____

Interviewer: Verify basic information with the person who answers the phone.

Phone Number: _____ Contact Name: _____ Title: _____ Property Name: _____ Fax Number: _____ Physical Address: _____ Mailing Address: _____ Rooms: _____	Alternate: «altphone» «manager» «title» «name» «fax» «add1» «add2» «city», MN «zip» «madd1» «madd2» «mcity», «mstate» «mzip» «size» («ptype»)	All information correct <input type="checkbox"/>
--	--	--

Interviewer: Ask to speak with «manager». If not available after multiple attempts, interview an alternate executive and record name/title below.

Contact Name: _____ Title: _____

- Is your property open only to members of special groups (club members, boy/girl scouts, church groups, etc.)? Yes ☐ -- Terminate No ☐ -- Continue
- Is your property available only for permanent or semi-permanent rentals (bookings of more than thirty days at a time)? Yes ☐ -- Terminate No ☐ -- Continue
- Is your property open all year? Yes ☐ -- Go to Q4 No ☐ -- Go to Q3A

3A. **If No** – When does your property open for the season? _____ «season_open»

When does your property close for the season? _____ «season_close»

For each month open -- How many nights is your property open for that month?

Jan	«jan»		Feb	«feb»		Mar	«mar»		Apr	«apr»		May	«may»		Jun	«jun»	
Jul	«jul»		Aug	«aug»		Sep	«sep»		Oct	«oct»		Nov	«nov»		Dec	«dec»	

No nights for **June through August** ☐ -- Terminate for this quarter.

- For the purpose of this study, please think of long term rentals as 30 nights or more. Of the rooms you have for rent, were any committed to long-term rentals, or were any otherwise not available for rental for the period **June 1, 2005 to August 31, 2005**?

Yes ☐ -- Go to Q4A No ☐ -- Go to Q5

- If Yes** -- As I read each month, please tell me how many of your total rooms were available to transient guests staying for less than 30 nights.

Jun		Jul		Aug	
-----	--	-----	--	-----	--

- What was your **average percent occupancy rate** for each of the following months?

Jun	%
Jul	%
Aug	%

(If not able to provide occupancy by month

OR **Seasonal Average** _____ %

Don't know/ unavailable ☐ -- Go to Q6

DBNO: «dbno»	Type: «type»	County: «county»	Q1: «qr1»	Q2: «qr2»	Q3: «qr3»	Q4: «qr4»	Status: «status»
--------------	--------------	------------------	-----------	-----------	-----------	-----------	------------------

Minnesota 2005/2006 Lodging Managers Survey – Quarter 3

6. What was your **average daily unit rate** for each of the following months?

*Interviewer: If the lodging manager is unable to provide the average daily rates please use the space provided in the column "other details" to record specific unit rate information for each month. (For example, number of **rooms** at each of several different rates, weekend vs. weekday rates, etc.)*

	ADR	Other Details
Jun	\$	
Jul	\$	
Aug	\$	

Only use if the manager is not able to provide ADR by month.

Seasonal ADR	
---------------------	--

Office Use Only: Estimated ADR: June	July	August
Estimated Seasonal ADR: _____		

For the next few questions, please think only of guests who are staying for less than 30 nights.

7. On average, how many nights did a typical guest stay in your property between **June 1, 2005 and August 31, 2005**?

Average # of nights	
----------------------------	--

8. What was the average number of guests staying in one room during the **June 1, 2005 to August 31, 2005** time period?

Average Party Size	
---------------------------	--

9. During the period **June 1, 2005 to August 31, 2005**, what percentage of your room-nights were rented to guests traveling for...

Pleasure/Personal:	%
Business:	%
Meetings/conventions:	%

10. Between **June 1, 2005 and August 31, 2005**, what percentage of your guests were from...

Minnesota	%
Other US locations	%
Canada	%
Other international locations	%

Comments:	
------------------	--

DBNO:	«dbno»	Type:	«type»	County:	«county»	Q1:	«qt r1»	Q2:	«q tr2»	Q3:	«qt r3»	Q4:	«q tr 4»	Status:	«status»
--------------	--------	--------------	--------	----------------	----------	------------	------------	------------	------------	------------	------------	------------	----------------	----------------	----------

INTERVIEWER USE ONLY

TIME BEGAN USING THIS FORM _____

TIME COMPLETED _____

- A. Are you a year-round, seasonal, or short-term/weekend resident of either this town or city or the immediate surrounding area?

Yes – Term:

01	02	03	04	05	06	07	08	09	10
11	12	13	14	15	16	17	18	19	20

No – Continue

- B. Are you visiting this area for the day or have you/will you spend at least one night here?

Day visitor – Continue

Overnight – Give questionnaire to respondent

- C. Have you traveled at least 50 miles from your primary residence to be here?

Yes – Give questionnaire to respondent

No – Term:

1	2	3	4	5	6	7	8	9
---	---	---	---	---	---	---	---	---

**Dear Traveler:**

Your visit to our area is very important to us. Please take a few moments to answer the following questions and return this questionnaire to the person who gave it to you.

Thank you very much. Your responses are very important.

1. What is your reason or reasons for visiting this area? *(Please check all that apply)*

(6)

1 [] Vacation/short pleasure trip

3 [] Convention/conference

2 [] Personal (wedding, funeral, medical, etc.)

4 [] Business/work

2. **While on this trip**, which of the following activities will members of your travel party participate in? *(Please check all that apply)*

(7-12)

General:

- 1 [] Casino gaming
 2 [] Dining out
 3 [] Driving on designated scenic byways
 4 [] Nightlife/evening entertainment
 5 [] Sightseeing/driving for pleasure
 6 [] Taking in city sites
 7 [] Viewing fall colors

Participating In:

- 1 [] Biking
 2 [] Canoeing
 3 [] Golfing
 4 [] Fishing
 5 [] Hiking
 6 [] Motor boating/water skiing
 7 [] Off-road ATV driving
 8 [] Pool swimming
 9 [] Lake/river swimming
 1 [] Jet skiing
 2 [] Wildlife viewing/bird watching
 3 [] Hunting
 4 [] Cross-country skiing
 5 [] Downhill skiing/snowboarding
 6 [] Ice fishing
 7 [] Snowmobiling
 8 [] Other activity _____

Visiting:

- 1 [] Amusement parks/carnivals
 2 [] Art museums
 3 [] Other museums
 4 [] Friends or relatives
 5 [] Historic sites
 6 [] Indian areas
 7 [] Indoor water parks
 8 [] Outdoor water parks
 9 [] State/national parks
 0 [] Other attraction _____

Attending:

- 1 [] Classical music concerts
 2 [] Fairs or festivals
 3 [] Popular music concerts/shows
 4 [] Professional sporting events
 5 [] Amateur sporting events
 6 [] Theater performances
 7 [] Other events _____

Shopping:

- 1 [] For gifts or souvenirs
 2 [] Outlet shopping
 3 [] Arts, crafts, antiques
 4 [] At the Mall of America
 5 [] General/mall shopping

3. How many nights in total do you intend to stay in either this town or city or the immediate surrounding area on this trip?

of nights _____

(13-14)

4. How many nights have you already spent in this area on this trip?

of nights _____

(15-16)

5. Are you staying overnight (either last night or tonight)...

(17)

In paid accommodations:

- 1 ☐ At a hotel/motel/historic inn
 2 ☐ At a Bed and Breakfast
 3 ☐ At a vacation home/condo/cabin/houseboat you rented
 4 ☐ At a resort (cabin/other indoor unit)
 5 ☐ In an RV at a campground
 6 ☐ In a tent at a campground

In accommodations with no charge:

- 7 ☐ At the home of family or friend
 8 ☐ At vacation home/condo/cabin/houseboat of a family or friend
 9 ☐ At your vacation home/condo/cabin/houseboat
 0 ☐ At a campground with no fee

6. **Not** including this trip, how many times in the last 5 years have you taken a pleasure trip in Minnesota? (18)

☐ 0 ☐ 1 ☐ 2 to 4 ☐ 5 to 10 ☐ More than 10

7. Including yourself, how many people are in your immediate travel party? (Please do **not** include your entire group if traveling on an escorted group tour, on business, or attending a convention/conference.) # _____ (19-20)

8. How many of those people are...

Younger than 6 years old # _____ (21-22) 6 – 11 years old # _____ (23-24)

12 – 17 years old # _____ (25-26) Adults # _____ (27-28)

9. Please tell us the amount **you and your immediate travel party** spent during **the past 24 hours in this area** in each of the following categories listed below. A few examples for each category are provided. If you have just arrived in this area, please estimate your expenses for the next 24 hours.

Spending Category	Amount Spent	
Lodging and Camping Accommodations (Fee FOR ONE NIGHT) <i>If you have not paid yet, estimate one night's cost.</i>	\$ _____ .00	(29-32)
Food and Beverages (meals, snacks, groceries, beer/wine/liquor "by the drink")	\$ _____ .00	(33-36)
Liquor Purchases (beer/wine/liquor "by the bottle")	\$ _____ .00	(37-40)
Sport Fees (outfitters, guides, gear rentals, greens fees, lift tickets)	\$ _____ .00	(41-44)
Events Admissions (sporting events, popular concerts, festivals)	\$ _____ .00	(45-48)
Cultural Performance Admissions (tickets for theater, opera, classical concerts, dance)	\$ _____ .00	(49-52)
Other Evening Entertainment (movies, clubs, lounges, etc.)	\$ _____ .00	(53-56)
Historic/Cultural Site Admissions (historic homes, sites, museums, exhibitions)	\$ _____ .00	(57-60)
Other Sightseeing/Attractions (tours, admissions)	\$ _____ .00	(61-64)
Shopping - Tourist (gifts, souvenirs, antiques, arts and crafts)	\$ _____ .00	(65-68)
Shopping - General (clothing, personal or household items)	\$ _____ .00	(69-72)

Ground Transportation (gasoline, parking, local bus, taxi, car rentals)	\$ _____.00	(73-76)
Lottery Tickets (scratch-off tickets, Powerball, etc.)	\$ _____.00	(77-80)
Gaming (gambling and legal betting activity)	\$ _____.00	(6-9)
Licenses/Registrations/Permits (fishing, hunting, ATV, snowmobile, trail pass)	\$ _____.00	(10-13)
All other, please explain: _____	\$ _____.00	(14-17)

Now, a few questions for classification purposes only:

10. What is your age, please? # _____ (18-19)

11. What is your total annual household income before taxes? (20)

- | | | |
|---------------------------|-----------------------------|-----------------------------|
| 1 [] Less than \$25,000 | 4 [] \$50,000 – \$74,999 | 7 [] \$125,000 – \$149,999 |
| 2 [] \$25,000 – \$34,999 | 5 [] \$75,000 – \$99,999 | 8 [] \$150,000 or more |
| 3 [] \$35,000 – \$49,999 | 6 [] \$100,000 – \$124,999 | |

12. Are you: 1 [] Male 2 [] Female (21)

13. Are you: *(Please check all that apply)* (22)

1 [] American Indian 2 [] Asian 3 [] Black 4 [] Hispanic 5 [] White 6 [] Other _____

14. Are you currently a resident of: (23)

- | | | |
|-----------------------|--------------------------------|---------|
| 1 [] United States | → Current home Zip Code: _____ | (24-28) |
| 2 [] Canada | | |
| 3 [] Another country | → Please specify: _____ | |

For validation purposes only, we will randomly contact participants to verify their answers. Results will not identify you with your answers and all answers will be reported in total. Your personal information will never be sold or used for marketing. Please provide us with the following information for validation only:

Name: _____ Phone Number: () _____ Email Address: _____

THANK YOU FOR YOUR HELP!

201 Lafayette Center
Kennebunk, ME 04043

Date: _____
Time Begun: _____

Quarterly Resident Survey -- Minnesota Tourism Study

Employee ID:

Speak to Head of Household:

Hello, I'm _____ from *Davidson-Peterson Associates*, a marketing research firm specializing in Travel & Tourism. We are talking to people in your area to learn more about vacation trips associated with visiting friends and family for Explore Minnesota and the State of Minnesota.

May I speak with the male or female head of household?

(IF TRANSFERRED TO ANOTHER ADULT, REPEAT INTRODUCTION. IF CONTINUING WITH THE SAME INDIVIDUAL WHO ANSWERED THE TELEPHONE, CONTINUE BELOW.)

May I ask you a few quick questions? This is not a sales call and your individual responses will remain strictly confidential. It should take only 3 or 4 minutes of your time.

First, is this your primary residence, meaning you spend a majority of your time living at this address?

- ☐ Yes (CONTINUE SURVEY)
- ☐ No (TERMINATE)

Are you eighteen years or older?

- ☐ Yes (CONTINUE SURVEY)
- ☐ No (TERMINATE)

1. Now, by visiting friends and relatives, we mean those people whose visit is considered non-routine -- please do not include routine visits by the same people, such as college students home for vacation. We're interested in those people who are on a vacation or non-routine trip.

Over the 3 month period of September, 2005 through November, 2005, on how many occasions did you have friends or relatives stay overnight in your home for at least one night on non-routine visits?

Number of occasions: _____

None ☐ - 00

Skip to Q.5

For Each Occasion:

2. Think about the **last** time you had friends or relatives visit. In what month was that? **(Record Below)**

3. How many people stayed with you on that occasion? **(Record Below)**

4. And, how many nights did they stay with you? **(Record Below)**

Repeat For Each Occasion (Transition: And, how about the time before that?)

Start With Last/Most Recent Occasion:

Q.2 - Month	Q.3 - # of People	Q.4 - # of Nights

If more than 14 occasions, enter the average # of people and nights for the remaining occasions, otherwise, skip to question 5.

Average # of people:_____ Average # of nights:_____

----Second Home Section----

5. Do you own a second home used for recreational purposes somewhere else in Minnesota?

Yes [] No [] **Skip to Q.13**

6. In which county is your **second** home located? _____

7. Over the 3 month period of September, 2005 through November, 2005, on how many occasions did you visit your second home for at least one night?

Number of occasions:_____ None [] - 00 **Skip to Q.13**

For Each Occasion:

8. Think about the **last time you visited your second home. In what month was that? (Record Below)**

9. Including yourself, how many people in your immediate family visited on that occasion? (Record Below)

10. And, how many nights did you stay? (Record Below)

11. How many people other than your immediate family stayed with you on that occasion? (Record Below)

12. And, how many nights did they stay with you? (Record Below)

Repeat For Each Occasion (Transition: And, how about the time before that?)

Start With Last/Most Recent Occasion:

[illegible]

If more than 14 occasions, enter the average # of people and nights for the remaining occasions, otherwise, skip to question 12.

Average # of **Family**:_____ Average # of **Guests**:_____

Average # of Nights: _____ Average # of Nights: _____

13. In total, including yourself, how many people live in your household?
of people: _____

14. What is the ZIP code of your home address? _____

15. In which county is your home located? _____

Respondent Name: _____

Record Gender: Male []-1 Female []-2

Phone number: _____

Thanks for taking the time to complete this survey. Your information is greatly appreciated. For verification purposes, you might be contacted in the future to go over the information you provided today. Once again, thanks.